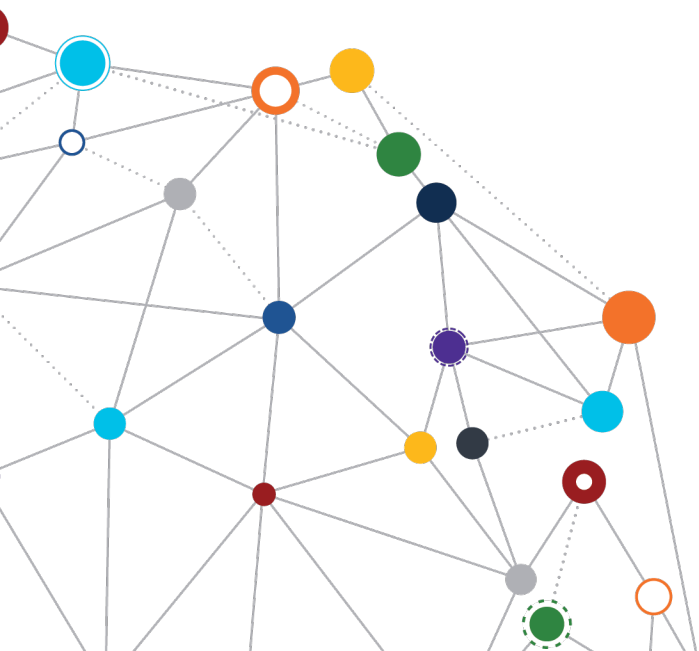




# VS GUI User Guide Addendum

*Release 1.7.7.4 Update*



**VA**



U.S. Department of Veterans Affairs  
Office of Information and Technology  
Enterprise Program Management Office



## Revision History

Date	Revision	Description	Author
6/29/2021	1.3	Changes accepted and updated Table of Contents and Figure.	HSP VSE PMO
6/29/2021	1.2	Increment release version to VS GUI 1.7.7.4 and removed content about VVS Appointment	VSE PMO Liberty IT Solutions
6/22/2021	1.1	Increment release version to VS GUI 1.7.7.1	VSE PMO
6/7/2021	1.0	Created Release Documentation	VSE PMO Liberty IT Solutions

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## 1 Introduction

Department of Veterans Affairs (VA) Veterans Health Information Systems and Technology Architecture (VistA) Scheduling Graphical User Interface (VS GUI) module is the Windows GUI version of the Patient Information Management System (PIMS) Scheduling module. It provides appointment management functions included in PIMS Scheduling, but with the added convenience and usability of a GUI.

### 1.1 Purpose

The Veterans Health Administration (VHA) Office of Veterans Access to Care (OVAC) requested an enterprise enhancement for the VS package that supports COVID-19 response. The enhancement reduces operating costs for VHA and improves operational efficiencies, resulting in patient-centered access to care, coordinated care, increased customer satisfaction, and the reduction of excessive cycle/wait time for scheduling patients.

### 1.2 Overview

VS GUI is a software module that allows schedulers to make appointments quickly by viewing multiple appointment request types and multiple clinics in one screen. A scheduler can easily view patient requests for service, find the next available open appointment, view the provider's availability in multiple clinics, and track a patient's appointment process. Refer to [System Summary](#) for a more detailed description of VS GUI functionality.

### 1.3 Disclaimers

#### 1.3.1 Software Disclaimers

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

#### 1.3.2 Documentation Disclaimers

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

## 1.4 Project References

### 1.4.1 Information

The VS GUI points of contact (POCs) include:

- » OVAC Program Office – REDACTED
- » OIT VistA Scheduling Enhancement (VSE) Technical Manager – REDACTED
- » OVAC Emerging Technologies Project Manager – REDACTED
- » OVAC Emerging Technologies Acting Legacy Program Manager – REDACTED
- » OVAC Emerging Technologies VSE Subject Matter Expert (SME) – REDACTED
- » OVAC Emerging Technologies VSE Subject Matter Expert (SME) – REDACTED
- » OVAC Emerging Technologies VSE Subject Matter Expert (SME) – REDACTED

#### VSE Resources

- » Veterans Health Administration (VHA) VSE SharePoint: REDACTED
- » VA Software Document Library (VDL) – Scheduling (VSE manuals near the bottom):  
<https://www.va.gov/vdl/application.asp?appid=100>
- » National Return to Clinic (RTC) Order: REDACTED

## 2 System Summary

The VSE project delivers a series of enhancements to legacy VistA Scheduling Version 5.3 via the VS GUI application.

This update is for the nationally released version 1.7.7.4, which includes VS GUI 1.7.7.4 and Emergency VistA patch SD\*5.3\*785. At time of publishing, install period is projected for July 2021.

VS GUI Release 1.7.7.4 update includes enhancements to the Request Management (RM) Grid to improve overall performance, an update to the patient search function, an update to patient letters to remove title from the salutation and 508 issue fixes.

Accompanying patch SD\*5.3\*785 enhances two options available in the Scheduling Supervisor menu:

- » *Pending Return to Clinic (RTC) cleanup - by Date*
- » *Pending Return to Clinic (RTC) cleanup – FULL*

These options now include prompts for the user before running, as well as a report of changes made.

## 3 Key Feature Update in Version 1.7.7.4

### 3.1 New Patient Search

Patient search is now a pop-up window. Click on the Search Patients link to open patient search.

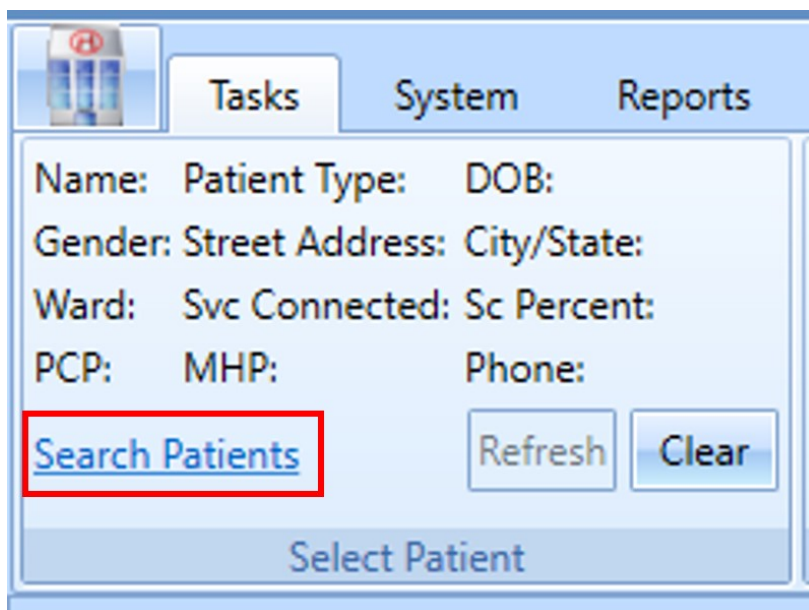
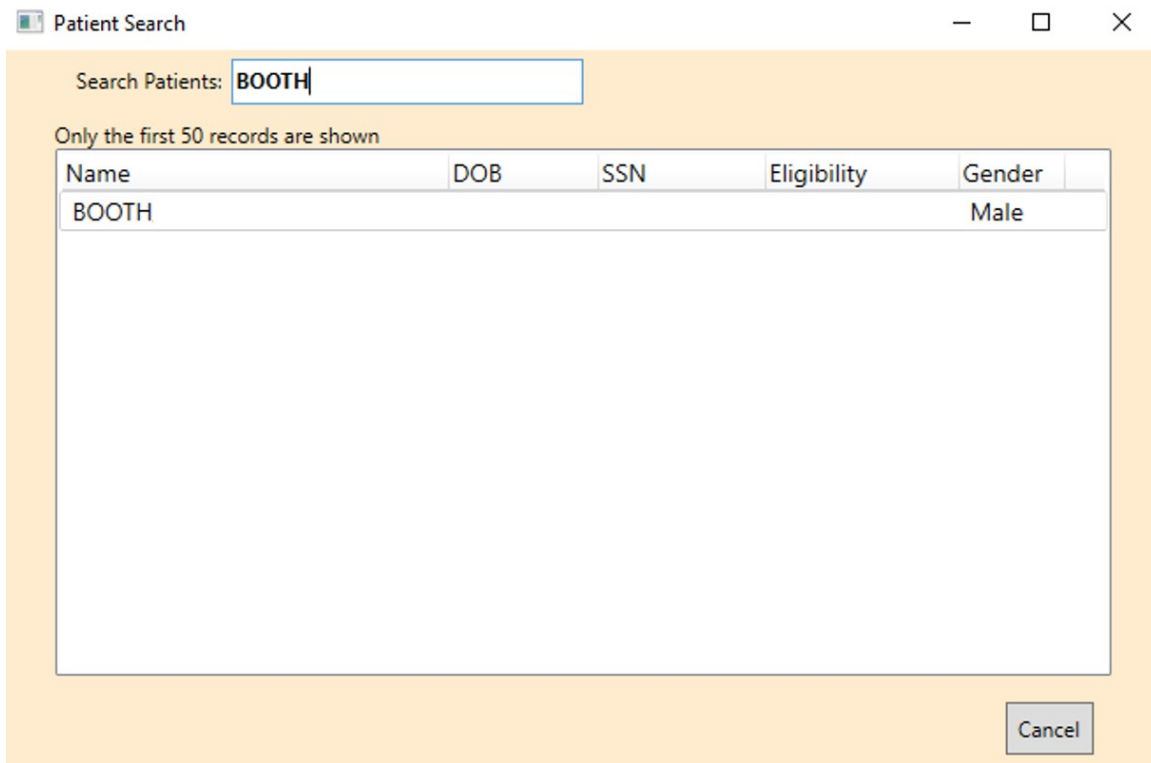
The image shows a screenshot of the VS GUI application interface. At the top, there are three tabs: 'Tasks', 'System', and 'Reports'. Below the tabs, there is a form with several input fields for patient information: 'Name:', 'Patient Type:', 'DOB:', 'Gender:', 'Street Address:', 'City/State:', 'Ward:', 'Svc Connected:', 'Sc Percent:', 'PCP:', 'MHP:', and 'Phone:'. At the bottom of the form, there is a 'Search Patients' link highlighted with a red rectangular box. To the right of the 'Search Patients' link are two buttons: 'Refresh' and 'Clear'. Below the 'Search Patients' link is a 'Select Patient' button.

Figure 1: Search Patients Link

Enter search criteria—results will display in real time in the results pane.

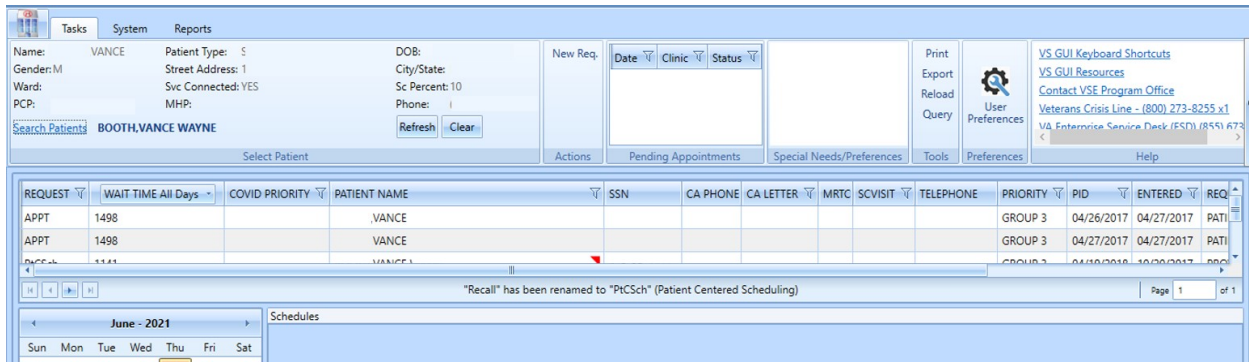


The screenshot shows a 'Patient Search' pop-up window. At the top, there is a search bar labeled 'Search Patients:' with the text 'BOOTH' entered. Below the search bar, a message states 'Only the first 50 records are shown'. A table displays the search results with columns: Name, DOB, SSN, Eligibility, and Gender. The first row shows 'BOOTH' under the Name column and 'Male' under the Gender column. The rest of the table is empty. A 'Cancel' button is located at the bottom right of the window.

Name	DOB	SSN	Eligibility	Gender
BOOTH				Male

Figure 2: Patient Search Pop-up Window

Select a patient from the list to pull up that patient record.



The screenshot shows a patient record interface. At the top, there are tabs for 'Tasks', 'System', and 'Reports'. Below these, patient information is displayed: Name: VANCE, Patient Type: S, DOB: , City/State: , Sc Percent: 10, Ward: M, Street Address: 1, Svc Connected: YES, PCP: MHP, Phone: . There are 'Refresh' and 'Clear' buttons. A 'New Req.' section has dropdowns for 'Date', 'Clinic', and 'Status'. On the right, there are links for 'Print', 'Export', 'Reload', 'Query', 'User Preferences', and 'Help'. Below this, a table shows patient records with columns: REQUEST, WAIT TIME All Days, COVID PRIORITY, PATIENT NAME, SSN, CA PHONE, CA LETTER, MRT, SCVISIT, TELEPHONE, PRIORITY, PID, ENTERED, and REQ. The first two rows show 'VANCE' as the patient name. At the bottom, there is a calendar for 'June - 2021' and a 'Schedules' section.

REQUEST	WAIT TIME All Days	COVID PRIORITY	PATIENT NAME	SSN	CA PHONE	CA LETTER	MRT	SCVISIT	TELEPHONE	PRIORITY	PID	ENTERED	REQ
APPT	1498		VANCE							GROUP 3	04/26/2017	04/27/2017	PATI
APPT	1498		VANCE							GROUP 3	04/27/2017	04/27/2017	PATI

Figure 3: Selected Patient Records

### 3.2 Modified Patient Letter

Patient letters now address the patient by name only, rather than by title (Mr./Ms.) and name.

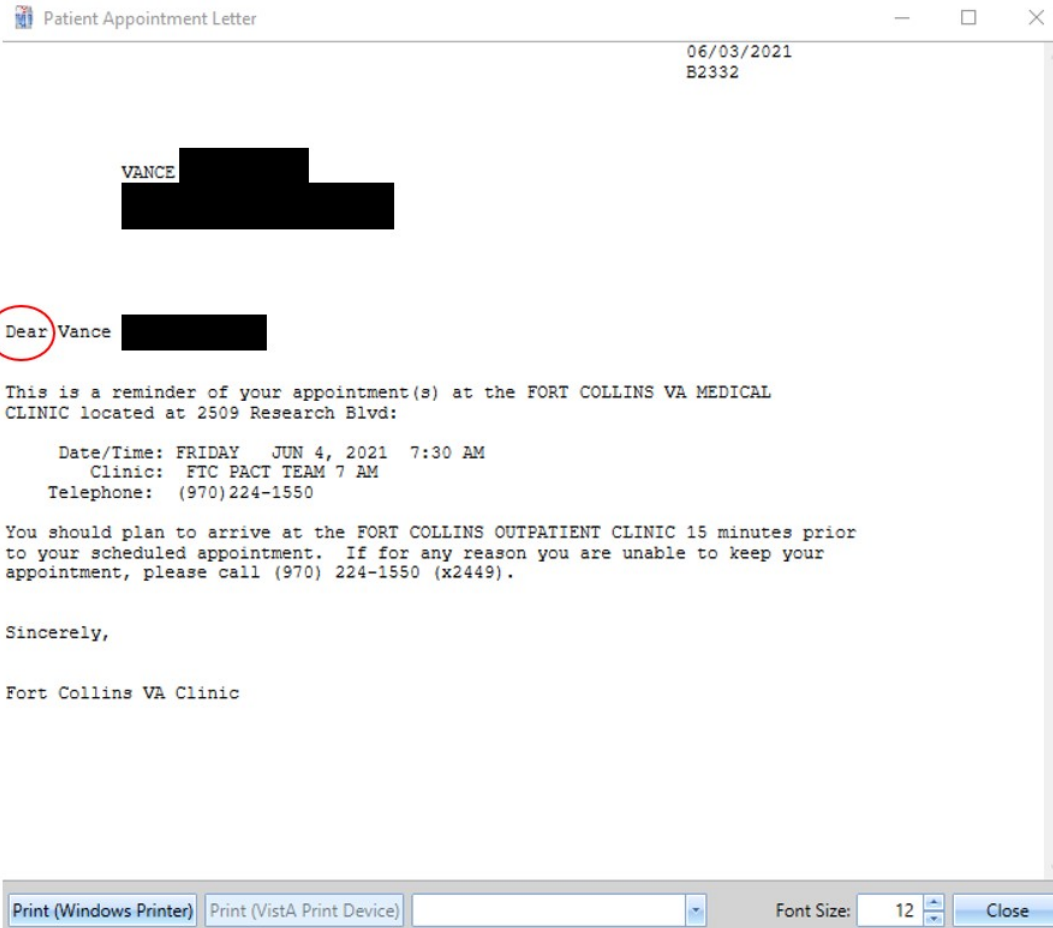


Figure 4: Patient Appointment Letter

### 3.3 Pending Return to Clinic (RTC) Order Cleanup

The Pending RTC Order Cleanup options address a scenario where RTC orders with scheduled appointments are stuck in "Pending" status in CPRS. The option is for emergency use to address a data issue resulting from improper use of FileMan to disposition RTC requests and is available only to users with the SDSUP key.

To run the Pending RTC Cleanup option, navigate to the Scheduling Supervisor menu.



```
ACR  Ambulatory Care Reporting Menu ...
AM   Appointment Management
CONS Consult/Request Main Menu ...
SDRR Recall Reminder Main Menu
      Appointment Menu ...
      Automated Service Connected Designation Menu ...
      Outputs ...
      Supervisor Menu ...
      Vista Scheduling GUI Resource Mgmt Report Data
Select Scheduling Manager's Menu <TEST ACCOUNT> Option: supervisor Menu

      Add/Edit a Holiday
      Appointment Inquiry
      Appointment Status Update Menu ...
      Appointment Waiting Time Report
      Appointments with missing resources
      Appointments with no resource report
      Automatically Fix Appointments with No Resource
      Cancel Clinic Availability
      Change Patterns to 30-60
      Clinics without matching resource list
      Convert Patient File Fields to PCMM
      Create a resource
      Create/Edit Local Cancellation Comments
      Current MAS Release Notes
      Edit Resource
      Edit resource for an appointment
      Encounter Inquiry
      Enter/Edit Letters
      Inactivate a clinic
      List Appointments and Encounters by status
      Look up on Clerk Who Made Appointment
      Manually Fix Appointments with No Resource

      Press 'RETURN' to continue, '^' to stop:
      Non-Conforming Clinics Stop Code Report
      Pending RTC cleanup - by Date
      Pending RTC cleanup - FULL
      Print Clinic Installation Checklist
      Purge Scheduling Data
      Reactivate a Clinic
      Release Appointment Request Locks
      Remap Clinic
      Resource Inquiry
      Restore Clinic Availability
      Scheduling Parameters
      Set up a Clinic
      Sharing Agreement Category Update
      Wait List (Sch/PCMM) Utilities ...
```

Figure 5: Running Pending RTC Cleanup by Date or FULL

### 3.3.1 Pending RTC cleanup – by Date

To run the cleanup by date, select Pending RTC cleanup – by Date.

You will be prompted to enter a start date, as shown below.

*Selection will be made based off of the create date of the Request*

*SDEC APPOINTMENT REQUEST CREATE DATE to start selection: 5/4/2021//*

Input a start date and press Enter.

*SDEC APPOINTMENT REQUEST CREATE DATE to start selection: 5/4/2021// 4/1/2021 (APR 01, 2021)*

Input an end date and press Enter.

SDEC APPOINTMENT REQUEST CREATE DATE to end selection: 6/3/2021// (JUN 03, 2021)

You will be prompted to confirm that you want to run the cleanup. Enter Y or N.

Are you sure you would like to run the SDEC PENDING RTC clean-up? Y (Yes)

DEVICE: HOME// HOME (CRT) Right Margin: 80//

Starting search and clean-up....

When complete, the option will print results to the screen, including specific orders updated, their original status, and any orders skipped and why.

Orders updated via the Clean-up Tool:

Request IEN = 248291 Patient = HOGUE Clinic = LORI AUDIO  
Order IEN10793623  
Original Order Status = PENDING  
Order Status After Cleanup = COMPLETE  
Request Disposition = REMOVED/SCHEDULED-ASSIGNED  
Disposition Date = May 14, 2021  
Dispositioned By = BARBER

Request IEN = 248293 Patient = HOGUE Clinic = LORI 20 MINUTE  
Order IEN10793624  
Original Order Status = PENDING  
Order Status After Cleanup = COMPLETE  
Request Disposition = REMOVED/SCHEDULED-ASSIGNED  
Disposition Date = May 14, 2021  
Dispositioned By = BARBER

Request IEN = 248294 Patient = BARBER,TEST Clinic = LORI AUDIO  
Order IEN10793625  
Original Order Status = PENDING  
Order Status After Cleanup = COMPLETE  
Request Disposition = REMOVED/SCHEDULED-ASSIGNED  
Disposition Date = May 14, 2021  
Dispositioned By = BARBER

Request IEN = 248295 Patient = BARBER Clinic = LORI TEST 20  
Order IEN10793626  
Original Order Status = PENDING  
Order Status After Cleanup = COMPLETE  
Request Disposition = REMOVED/SCHEDULED-ASSIGNED  
Disposition Date = May 13, 2021  
Dispositioned By = BUTLER

Request IEN = 248388 Patient = HOGUE Clinic = LORI ENCOUNTER CLINIC  
Order IEN10793638  
Original Order Status = PENDING  
Order Status After Cleanup = COMPLETE  
Request Disposition = REMOVED/SCHEDULED-ASSIGNED  
Disposition Date = May 14, 2021  
Dispositioned By = BARBER

\*\*\*\*\*

The following SDEC APPOINTMENT REQUEST IENs were skipped:

Request IEN 248296:  
Disposition By field is Missing  
Disposition Date field is Missing  
Disposition field is missing  
Request IEN 248353:  
Disposition By field is Missing  
Disposition field is missing

Search and clean-up is complete!!!!  
5 Orders were updated!

Orders that are updated will be saved for 7 days in the  
XTMP("OR PENDING RTC CLEAN-UP-May 14, 2021",21676 global.

Figure 6: Pending RTC Clean-up by Date Results

### 3.3.2 Pending RTC Cleanup – Full

To run the cleanup in full, select Pending RTC cleanup – FULL. You will be prompted to confirm you want to run the clean-up.

*This routine will search through existing Closed Return to Clinic SDEC Appointment Requests with a corresponding Order that is in a Pending status and update as needed.*

*Are you sure you would like to run the FULL SDEC PENDING RTC clean-up?*

Enter Y or N

Orders updated via the Clean-up Tool:

Request IEN = 248292 Patient = HOGUE [REDACTED] Clinic = LORI AUDIO  
Order IEN10793622  
    Original Order Status = PENDING  
    Order Status After Cleanup = COMPLETE  
Request Disposition = REMOVED/SCHEDULED-ASSIGNED  
    Disposition Date = May 14, 2021  
    Dispositioned By = BARBER [REDACTED]

\*\*\*\*\*

The following SDEC APPOINTMENT REQUEST IENs were skipped:

Request IEN 248353:  
    Disposition By field is Missing  
    Disposition Date field is Missing  
    Disposition field is missing  
Search and clean-up is complete!!!!1 Orders were updated!

Orders that are updated will be saved for 7 days in the  
^XTMP("OR PENDING RTC CLEAN-UP-May 14, 2021",21676 global

Figure 7: Pending RTC Clean-up Full Results